MEMBER HANDBOOK

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Welcome to ProVisors!

We’re excited to welcome you to our community of Trusted Advisors. It is our hope that through your Membership in ProVisors, you’ll expand your business, develop a portfolio of professionals to help you serve your existing clients, build your personal brand, and make lasting friendships.

Our Member Agreements contain information designed to provide you with a springboard for success. The Member Agreements contains the following main elements:

- The Member Handbook (this document) will help orient you to how we operate and answer many of the questions you may have about ProVisors. We’ve included a section to help you get started, and another with tips for making the most of your Membership!
- The Code of Conduct & Policies, which contains our Code of Conduct and Member Responsibilities (as well as other documents), spells out the policies, processes and expectations that you agree to when you join ProVisors. It’s important that you read this in its entirety to ensure you remain a Member in good standing.

Note: as you read through this, you’ll find some terms that are unique to ProVisors. We provide brief descriptions the first time you encounter those terms (Troikas, testimonials, etc.) and if you keep reading, you’ll find them explained in more detail in a later section.

If you have any questions, please reach out to your Provisors Member Services Representative, Regional Director, Group Leader, or – once assigned – your mentor. We’re all committed to supporting your success as part of the ProVisors community!

Overview

Our Mission

ProVisors is a community of experienced professionals who serve their clients as Trusted Advisors and share the highest standards of integrity, performance, and accountability. ProVisors promotes and enables relationship building, information sharing, and collaboration among its Members for the benefit of our clients and one another.

Our Story

We started in 1988 as a select group of top “trusted advisors” to the Los Angeles business community, from attorneys to bankers. More than three decades later, ProVisors is a national organization with Members in major cities throughout the United States.

We began with the premise of creating a platform for professionals to build authentic relationships and leverage those relationships to organically grow Members’ businesses. Out of this vision, we evolved a system – and support organization – to accelerate business results by harnessing and simplifying best practices in the development, nurturing and leveraging of relationships. This allows our Members to get a high return on the amount of time they invest.

The key ideas behind our innovative system are:

- A network curated to maximize referrals: Our Membership formula ensures that you connect with people who can impact business growth. The mix in each group maximizes cross--referral opportunities across disciplines, both within your core group and when you “Guest” at other ProVisors groups.
- A model that drives business: “Know. Like. Trust. Refer.” At the highest levels of business, top professionals refer business to colleagues they know, like, and trust. It’s about relationships. Our unique model and process systematize this dynamic. You become part of an inside circle of influencers in days, not years.
- The powerful principle of reciprocity. The ProVisors system inspires Members to refer business and help each other. We enable the reciprocity that makes relationships thrive. For example, at every monthly meeting, Members give “testimonials,” which is our way of recognizing people who give business referrals. (More information on testimonials is provided in the “Key Aspects of Our Meetings” section below.)
- Deep connections in less time, on a national scale. Each monthly ProVisors meeting is structured to maximize interconnectedness in the brief time the group spends together.

Our Members

Members join ProVisors to build relationships with other trusted advisors so they can get to know, like, trust and then refer them to their clients and other Members. Membership in ProVisors is by invitation only and is limited to highly respected professionals from a deliberately curated mix of industries who commit to uphold the highest standards of integrity, performance, and accountability.

Our Members are experts in a wide range of fields, including law, accounting, banking and finance, insurance, and consulting. Some are sole practitioners or Members of boutique firms; others practice within large, global organizations. They serve businesses ranging from small companies to the Fortune 500, with a concentration in the middle market.

While ProVisors reserves the right to add/remove professional industry segments based on evolving market and Membership needs, below is a snapshot of our current Membership composition:

- Accountants
- Attorneys
- Banking and Finance
- Commercial Real Estate
- Consulting
- Financial Services
- Human Resources
- Insurance
- Investment Management
- Marketing

Anti-Discrimination and Anti-Harassment Policy

ProVisors strives to provide a Membership experience that is safe and respectful and free from all forms of discrimination, harassment, retaliation, bullying, or intimidation including, but not limited to, on the basis of gender, sex, religion, ethnicity, age, sexual orientation, gender identity, or disability. Any comments or behavior that makes someone feel intimidated, degraded, humiliated or offended has no place at ProVisors and will not be tolerated. Do not assume an inappropriate comment is welcome or well received if the receiving party does not respond or object. Silence is not acquiescence or agreement.

If you are the recipient of unwanted or inappropriate comments or behavior, you should address the offender directly and unequivocally. A self-help approach to resolve a situation informally may prevent others from experiencing unwanted behavior and prevent the unacceptable conduct from escalating. If you are not comfortable addressing the situation yourself, please follow ProVisors' "Complaints Procedure" set forth in the ProVisors Code of Conduct as soon as practicable.

It is critical that anyone who witnesses discriminating or harassing behavior make it known. Follow the guideline "See Something, Say Something." ProVisors can only take action in response to known incidents. Complaints will be taken seriously, fully and timely investigated, and fairly resolved.

Getting Started

We've shared with you a separate QuickStart Guide to help set you up for success during your first month as a Member. As part of that, we recommend you attend both an orientation call with your Member Services Representative and a New Member Orientation.

New Member Orientations

New Member Orientations (NMOs) are regularly scheduled meetings that usually take place around lunchtime and serve as an orientation to ProVisors. Led by Group Leaders or Provisors' staff, this workshop will review best practices, company policies, and tips to set you up for success. It's a great opportunity to meet other Members and expand your network. Your Group Leader or Member Services Representative will be able to tell you when the next New Member Orientation is scheduled.

Here's a taste of what we cover during these interactive sessions:

- Overview of our model: "Know. Like. Trust. Refer."
- ProVisors policies and etiquette
- How to:
    - Maximize your Membership
    - Prepare for, participate in and guest at meetings
    - Give an effective testimonial
    - Craft and deliver a memorable introduction
    - Market/refer your fellow Members to your clients, friends and family
    - Help fellow Members and be a valued Member of the Group

After you complete your 30 Day Checklist and attend a New Member Orientation, we encourage you to move on to the tips below to keep your momentum going.

Tips for Success Beyond Your First 30 Days

While your first 30 days are critical for establishing a strong foundation in ProVisors, maximizing your Membership is a marathon, not a sprint! Here are some other ideas for how you can continue to deepen your roots during the course of your Membership.

- Attend meetings regularly.
    - Strive to attend ALL your Home Group meetings and events.
    - Arrive early for pre-meeting networking if it's offered.
    - Guesting is one of the best value-adds of Membership – challenge yourself to explore other regional and Affinity groups by guesting at <u>at least</u> one additional meeting each month. (Note: Affinity Groups are optional groups you may attend that align to specific interests/professions. For more information on Affinity Groups, please visit "All You Need to Know About Affinity Groups" below.)
    - If you have a testimonial for someone outside your Home Group, attend that Member's meeting and give it there – not only will that Member appreciate the effort, but it will also strengthen your relationship with that group's Members.

- Prepare for meetings.
    - Know exactly what you'll say when called upon. (For more information on the proper format, see the section on Introductions + Testimonials, below.)
    - Keep a running list during the month to remember whom to acknowledge when it's time for Testimonials and be both brief and specific when delivering them.
    - Be prepared to share and respond to Needs/Deals/Wants for additional visibility.

- Build your network.
    - Identify your strongest alliances within ProVisors and foster these relationships diligently.
    - Get to know the Group Leaders and make sure they understand what you do – they are often the greatest facilitators of commerce within the organization.
    - Be on the lookout for potential new Members who can bring additional resources to ProVisors – they will instantly be a strong ally and resource for you.
    - Think about the profile of your best referrers (profession, geography, etc.) and use The Hub to find those people, see what groups they are in, and attend those meetings with a goal of connecting with them in a Troika.
    - Cultivate a relationship with your Regional Director, they can be one of your best referral sources.

- Connect meaningfully during Troikas.
    - Note: A Troika is a meeting of three ProVisors Members with the goal of getting to know each other in a less formal setting. There's more information on this in the "Key Aspects of Our Meetings" section below.
    - Troika content should be 70% business, 30% personal and the time should be equally shared by attendees. Take time to get to know each other personally – hometowns, hobbies, families, etc. This is how we advance the "know + like" part of our motto!

- Cultivate Reciprocity in Thoughts & Actions
    - Listen closely. Look for opportunities to create meaningful introductions for others. Share experience as a resource.
    - Become known as a "giver," and you'll be surprised by all that comes back to you!

- Maximize Your Investment
    - Know what your Membership activity costs in both time and money – and create a plan to ensure a strong return on this investment.
    - Take advantage of <u>all</u> the opportunities to connect beyond your Home Group. This is a national organization with a strong sense of community. Members are willing to help each other simply by virtue of being part of this organization.
    - Show up when the room opens for your meeting; do not leave until the meeting is over.

- Amplify Your Personal Brand
    - The greatest successes within ProVisors aren't based so much on who you know, but on those who know who you are and your reputation for helping and connecting others. Make yourself visible by being a giver and a connector!

- Join your region's Provisors LinkedIn group.

    - LinkedIn expands your networking to a national level. It allows Members to connect with professionals from other regions for resources and referrals for your clients.

- Take advantage of (or post) opportunities on ProVisors Business Opportunities on The Hub.

- Attend our broader networking events in your region (when offered).
    - In our major regions, where we have 200+ Members, we occasionally offer region-wide evening networking events. All Members of the region are invited (and encouraged!) to attend these events to maximize attendance and create the opportunity for even more Member connections. We recognize this may require a bit more travel for some Members, but past attendees have found it worth the investment.

All You Need To Know About: Home Groups

Your Home Group is the heart of your ProVisors experience. Your Home Group will meet monthly, and we ask Members to commit to attend at least 75% of their Home Group's meetings. This is how other Members get to "Know. Trust. Like. Refer." you. By attending regularly, you'll help other people understand what you do and build lasting relationships that lead to more referrals.

The Fine Print

- Your Membership investment covers <u>one</u> Home Group Membership.
- Your Home Group Membership will be up for renewal annually.

What to Expect at a Home Group Meeting

We'll explain what <u>generally</u> happens during a meeting, with a blanket caveat that our Group Leaders have the autonomy to put their own spin on things. What we outline here is the standard, but you may observe some slight variations in your own experience.

First, when you RSVP for a Home Group meeting, a day or two prior to the meeting the Group Leader will share with you a copy of the meeting agenda and a photo list or attendee list for everyone who plans to attend the meeting.

The meeting itself will be structured in support of the Group Leader's focus for the day. Sometimes there may include a panel discussion, an expert presentation, a group activity, etc. Regardless of the special focus, there are a few key elements you can expect in every meeting:

- Informal networking prior to the meeting start
- Introductions
- Testimonials
- Needs/Deals/Wants
- Troika Assignments

Note: There is a section at the end of this handbook (Key Aspects of Our Meetings) that provides more details on each of these elements, so you know what to prepare and how to participate. We encourage you to read this before attending your first Home Group Meeting.

Meeting Protocols

Scheduling

- To attend a Home Group meeting, just RSVP via The Hub. This will mean:
    - A seat is reserved for you.
    - You'll be added to the attendance/photo list that's available to Members in advance; and
    - The meeting will show under "My Registrations."
- If you're not able to make a meeting you've already signed up for, it's important to update your RSVP with as much advance notice as possible.

- Technically you may cancel your RSVP online at any time, but we ask that if you are canceling within 48 hours of the meeting, you also reach out to the Group Leader directly to give them a heads-up. Not only will that help the Group Leader and Troika Master plan, it also opens a seat from the waiting list, which may result in commerce for the group.
- No-Showing a meeting you've registered for is unacceptable, except In the event of a true emergency. In the very rare case that happens, please follow-up personally with the GL as soon as you're able to explain and apologize.

Preparing for the Meeting

- Bring your ProVisors name badge, a pen, and your calendar/phone (for scheduling your Troika and sharing cell phone numbers). Bring business cards for introductions.
- Dress appropriately. Remember that you are representing your firm and your professional brand – business attire is highly recommended.
- If your group is meeting virtually, it's still important to present yourself professionally: always have your camera on, keep yourself muted when not speaking, and minimize distractions. Treat virtual meetings as you would an in-person meeting.
- Study the photo/attendee list so you can possibly select someone with whom you would like to Troika. If you find someone you'd like to be paired with, please reach out to the Troika Master in advance to request a specific Troika.

During the Meeting

- Be respectful of the "airtime" afforded you – keep it short, simple, and to the point!
- Be present – put your phone away and focus on whoever is speaking.
- Be positive – play an active role in making the group fun and friendly.
- Be professional – remember that this is a business-based group so how you show up is a reflection of your brand.
- Be curious – listen for opportunities to offer help or send business to another Member.

All You Need to Know About: Guesting

Overview

In addition to belonging to a Home Group, which you attend regularly, one benefit of your Membership in ProVisors is the ability to visit other Home Groups as a Guest – or "guesting" as it's known. When guesting, you not only connect with the Members of that Home Group, but any other Guests or prospective Members in attendance. This expands the reach of your brand and allows you to expand your network for referral resources. As Trusted Advisors, our credibility hinges on making the right connection, so the more people you know, the more helpful your referrals are likely to be. Guesting is considered a way to "super-charge" your Membership because it exponentially increases your opportunities to know and be known by other Members!

The Fine Print

- You may guest as many Home Groups as you like – up to three times per group during a calendar year.
- You may guest any Affinity Groups (to which you meet the requirements for attendance – see: Affinity Groups) as many times as you would like each year for no additional fee.
- Your Home Group guesting limit resets on January 1, regardless of your anniversary date.
- Note: guesting at another Home or Affinity Group is dependent upon space/availability and approval of that Group's Leader.

Benefits of Guesting

We've alluded to some of this above, but it bears repeating: If you only attend the meetings of your ProVisors Home Group, you deny yourself the full benefit of Membership! The opportunity to develop deep relationships with Trusted Advisors and respected professionals from many different professions and specialties, who serve as resources for each other's clients, is invaluable. Here's why:

- You can better expand your resources in terms of contacts and Trusted Advisors.
- The more the Membership is familiar with your skills, expertise, and personality, the more likely they are to remember you in a needed situation.
- You can better communicate your needs in the presence of larger numbers of Members and via other group meetings.
- The professional development benefit is very valuable as most meetings offer a forum, a focused presentation, or a discussion item that is applicable to all present.
- Attending additional meetings allows you to participate in more Troikas and this is where the meaningful relationships often foster themselves.
- The Group Leaders know all the Members in their group and throughout ProVisors. Having the GL familiar with you and your expertise creates a reference point for GLs to assist their Members with needs, deals, and wants as they arise.

Guesting Strategies

- We suggest guesting <u>at least</u> once per month and encourage you to try guesting two (or even three!) times per month, if you can. Highly active Members target for 3-4 meetings a month outside of their Home Group.
- Bear in mind: each meeting you attend will, by default, place you on a Troika, so this is an additional time commitment from each guesting opportunity.
- Don’t neglect your Home Group! Guesting isn’t intended to be a substitute for your Home Group meeting.
- After you guest at a meeting for the first time, determine if it’s a group you’d like to visit again. If so, consider whether you’d find more value in attending it three months in a row, or if you’d rather spread out your visits over the course of the year. (There are pros and cons to each approach!)
- Plan your guest visits so they work well for you both from a time standpoint and geographically.

Guesting Protocols

Scheduling

- When you login to The Hub, you will see a calendar of events displaying all the meetings and events happening in ProVisors. From here, you can request to guest. The popular meetings usually book up fast, sometimes months in advance, so we recommend submitting requests as soon as possible!
- When you submit a guest request, you’ll receive an email confirming your request was submitted, and the Group Leader of that meeting or event will approve or deny the request. Once approved, the meeting or event will show under “My Registrations,” on your portal. You should only attend meetings where you’ve been approved – it is poor form to attempt to attend a meeting for which you haven’t been approved.
- Please refer to the Meeting Protocols outlined above (under Home Groups) to understand how to prepare for the meeting and what is expected if you are unable to attend a meeting that you’ve registered for.

During the Meeting

- Introduce yourself to the GL upon arrival and thank him or her for allowing you to attend. In a virtual setting, you may need to do this via the private chat function before the meeting starts.
- Let the GL or Troika Master know if there is a particular Member with whom you would like to Troika in advance of the meeting either verbally or by email. The Troika Master will generally partner people at random using the attendee list; if you’re NOT available to Troika, let the Troika Master know prior to the meeting or via private chat at the start of the meeting. Many Troika Masters pre-assign Troikas prior to the meeting.

When presenting yourself at a meeting, identify your name, business, and the group in which you are a Member (this is important so people have a reference point to find/follow up with you). Be respectful of the “airtime” afforded you. Keep it short, simple, and to the point.

All You Need to Know About: Affinity Groups

Overview

In addition to joining a Home Group, you'll also have the opportunity to join special interest or industry/sector-specific groups known as Affinity Groups.

Affinity Groups are designed to provide you with targeted opportunities to build relationships with other Members working in similar fields or who share similar interests. In addition to providing a platform for creating connections with other Members, Affinity Groups are generally centered around an educational or content-driven agenda. (In some cases, Members requiring continuing education credits for their professions can satisfy them through these meetings.)

In each region ProVisors begins to establish a core set of Affinity Groups once we have 200+ Members:
- Women's
- Lawyers and Legal Professionals
- Mergers & Acquisitions / Corporate Deal Makers
- Real Estate
- Estate and Succession Planning

In addition, we sometimes will create other Affinity Groups unique to a region based on its Membership or emerging needs. These needs are identified and thoroughly assessed by ProVisors staff. You can find a complete list of all Affinity Groups on the Resources page: "Regions and Meetings at a Glance."

The Fine Print
- Affinity Group Memberships are included at no additional charge as a benefit of your ProVisors' Membership.
- While there's no charge for the Membership, there may be a fee associated with an in-person meeting to cover the cost of the meal.
- You may guest at Affinity Groups an unlimited number of times, with Affinity Group Leader approval.
- Affinity Groups typically meet at lunch, from 11:30 - 1:30pm with the first half hour set aside for open networking before the actual meeting starts at 12:00pm.

Benefits of Joining Affinity Groups

The benefits of Affinity Group Membership include:
- You can RSVP for meetings without needing approval as you do when guesting. These meetings also then appear under "my meetings" so you don't have to search for them.
- You'll be included in any meetings or social events that are offered exclusively to Members of the group.
- You'll be added to their Member List so that you'll show on the website, which gives you greater visibility within the ProVisors community.

Affinity Group Protocols

Options for Attending

There are two ways you can attend an Affinity Group:

- As a Member-Guest:
    - This is a great option if you're exploring various Affinity Groups, or if you're not yet ready for a monthly commitment.
    - To attend a meeting, you simply need to request to guest using The Hub (space permitting).

- As a Member: If you meet the requirements of the group, and can commit to attend 75% of all meetings/events of this Affinity Group, we encourage you to request to join the Affinity Group as a Member.

Becoming a Member of an Affinity Group

- You'll need to meet the qualification standard for the group as defined in its mission statement (ie. attorney, women, real estate, etc.). Anyone meeting the qualification for the specific group is allowed to request to join, depending on the availability of a seat as determined by the Affinity Group Leader.
- Assuming your qualifications align with the mission of the group, reach out to the Affinity Group Leader to express interest and ask to join the group.
- Once the Affinity Group Leader approves your Membership, let a ProVisors Member Services Representative (MSR) know. Once the MSR can confirm your Membership with the Affinity Group Leader, they will officially welcome you to the Group and add it to your Membership on The Hub.

Key Aspects of Our Meetings

In the following section, you'll learn about a few key elements of ProVisors' meetings where we have fairly specific protocols for how they're executed. While you observed these in action when you attended a meeting before joining ProVisors, you probably didn't pay attention to the mechanics. We recommend reading this section before attending your first meeting as a Member so you'll know how to best present yourself.

Introductions

When you attend a ProVisors meeting – either as a Member or a Guest – you'll be asked to introduce yourself. The Group Leader will usually establish a specific sequence, so you'll know when it's your turn to hold the floor. Since everyone attending the meeting will get a chance to introduce themselves, it's important to be succinct and memorable.

A standard introduction takes about 30-45 seconds to deliver and includes:
- Your name
- Your organization
- Your role – but instead of just saying "I am a…" share the primary problem you solve
- A memorable, 1-2 sentence value proposition that explains who your clients are and how you help them – in language a high school student could understand

Sample Introduction
- Your name: I'm Jane Roberts.
- Your company: I run a company called Legacy Ventures.
- What you do: We help family-run companies pass the reins from the founder to a new CEO.
- Your target client: Our clients are typically $20-200m in annual revenue and have a founder who is preparing to exit.
- What differentiates you: Our team includes licensed psychologists, so we can support not just the mechanics but the emotional well-being of clients in transition.
- Credibility statement: I've been doing this for 15 years and have personally led nearly 100 successful founder transitions.

Sometimes the Group Leader will ask people to introduce themselves <u>and</u> answer a specific reflection prompt. When this happens, they will usually provide you with a time limit to ensure everyone gets a turn. If a time limit isn't provided and you're asked to introduce yourself and share a fun fact, please keep it brief! Your most impactful contributions will be short and sweet!

Testimonials

You probably noticed that ProVisors' Home Group meetings devote a significant amount of time to Testimonials. There's a reason for that: Testimonials are how we drive commerce!

Since ProVisors has a strict non-solicitation policy, you can't overtly sell your services to other Members or ProVisors staff. You can, however, deliver a testimonial to thank someone for giving you a referral or making a strategic introduction. This flipped approach is core to ProVisors' model and how we bring to life our principle of "Know. Trust. Like. Refer."

This approach to testimonials:

- Promotes a culture of "giving to receive" – what goes around, comes around
- Prevents our meetings from feeling salesy or undignified
- Generates confidence in the work our Members do for each other's clients

Format an Effective Testimonial

Testimonials are most meaningful when they tell a compelling story. The challenge is to do this as concisely as possible since you'll usually be asked to keep your testimonial to about one minute, depending on the size of the group. You should make sure to include:

- The name of the person who referred you
- The firm they are with
- What they do and what makes them great
- A brief description of what they referred to you (testimonials are appropriate whenever a business introduction was made, regardless of if it resulted in commerce or not)
- If you are collaborating with the referrer on this project, please explain why/how your disciplines come together to help educate other Members
- A very brief elevator pitch to introduce yourself if you didn't already cover that

While testimonials should always focus primarily on highlighting the person who sent you the referral, the example you share will also help Members recognize how people in different professional specialties need you for their clients in which they should think of you. As a rule of thumb, earmark 80% of your talk-time for highlighting the person who referred the opportunity to you, and only 20% should be spent on your role in the process.

Example of an Effective Testimonial

I would like to thank Bob Smith, a CPA and partner of ABC Accountants, and a Member of Group ABC1. If you haven't yet worked with Bob, what makes his practice special is that they <fill in the blank!>. Bob brought me in on a client whose two partners wanted to take their business to the next level. Their business was lacking financial controls, and the partners were not in agreement on where the business was going and how to get there. That is why he brought us in to help. My name is Susan Jones of XYZ Consulting Firm.

Troikas

At each group meeting, Members and Guests are assigned to a "Troika," which is an informal, non-hosted meeting of 3 people (sometimes 2 or 4 if there's an odd number of people in the meeting) scheduled during the month following the meeting, designed to foster deeper relationships. These meetings typically take place over a meal or activity – or virtually.

Tip: Study the photo list or list of attendees in advance of the meeting. If there's someone you'd like to Troika with, reach out to the Troika Master to make this request. While the Troika Master won't always be able to honor these requests, they'll do their best to connect you with that person. Many Troika

Masters require that you submit your requests 24 hours in advance as they may pre-arrange Troikas the night before the meeting.

To be assigned to a Troika, you must attend the group meeting. Note: in a virtual setting, Troikas may happen immediately following the group meeting.

Preparing for a Troika

- Bring your calendar to group meetings so that you can schedule a Troika that day. If your assistant handles your scheduling, have a hard copy of your schedule for the next month so you can make plans while everyone's together. (It's inconvenient to email back and forth to find a date after the meeting.)
- If meeting in person, the Troika should happen in the same city as where the meeting occurred, unless a different location is mutually agreed upon by all Members.
- Appoint someone in your Troika to send a confirmation/reminder a few days before the meeting. If you're meeting virtually, you'll need to agree on a platform (e.g., Zoom, Facetime, GoogleMeet, etc.) and designate someone to set that up.
- Exchange cell phone numbers so that if you are going to be late or need to cancel, you'll be able to notify others. Note: If you need to cancel, please be considerate of other Members. As an example – for morning meetings, people are likely to head straight to the Troika without checking their email, so call if you need to cancel the same day.
- Confirm both the venue name and address for the Troika. (Trust us – this may seem simple, but we've had people arrive at different Starbucks!)
- Treat your fellow Members with the respect you would like for yourself, do everything in your power to show up on time and don't cancel unless absolutely necessary.
- Prior to your Troika:
    - Logon to The Hub to read your Troika partners' Member profiles, check out their websites, and look at their LinkedIn profiles By doing this you'll have a general idea about what they do and a sense of what you'd like to learn during your Troika.
    - Think about how you can help fellow Members and their clients, and to whom you can introduce them. Identify other partners at their firm who have different specialties. Your Troika partners will appreciate that you took the time to find out what they do – and hopefully follow your lead by doing the same for others!

During the Troika

- Listen for connections. Think about how you can help the others in your Troika and how they might be able to help you.
- Be considerate. Lead by learning about others first, rather than dominating the conversation. Each person should have equal airtime to discuss their business.
- Go beyond your standard introduction – give examples and tell stories to help people really visualize and remember what you do. Invite questions to help them better understand what you do, how you add value, and how you could collaborate with them.
- Ask your partners to describe two specific clients to help you understand what they do.
- Ask open-ended questions. Where do you spend most of your time? Who is your typical client? Where does the majority of your business come from?
- Introductions are key. Offer to introduce your Troika partners to other professionals who could generate business for them. Ask them to do the same for you!

- Ask your Troika partners to introduce their key referral sources to your Regional Director as candidates for Membership consideration.
- Share examples of Trusted Advisors who have an established cadre of ongoing clients who see them as a valuable advisor in more than their specific area of expertise.
- Praise fellow Members and ask your Troika partners if they know that person. Think of ProVisors Members unknown by your Troika partners who may benefit from an introduction.
- Make and leave an impression. Feel free to send information to your Troika partners – as long as it isn't sales material.
- Protocol is that any bill is split evenly among the attendees. If you feel what you ordered was more than what other Members ordered, offer to contribute a larger amount toward the total.

Troika Follow-Up

- If you said you were going to make a call or contact someone to make an introduction, do what you say; then, call your Troika partner to let them know what you have done.
- One meeting may not be enough – feel free to schedule your own follow-ups. Additional meetings over time will increase the probability of referrals.
- Send updates about your practice; share new cases you have worked on to show how you can be helpful to referral sources and their clients; remind each other about professionals who help build your practices; make new introductions; and share innovations in your field.

ProVisors Business Opportunities

In addition to referrals, you might make through getting to know your fellow Members, ProVisors has created a format for surfacing instant commerce. On The Hub and in our emails, you'll find it under ProVisors Business Opportunities – a forum for people to share timely requests.

How It Works

- An online submission form can be accessed from The Hub. There are three posting opportunities:
  - Advisors Needed: Post an Advisor Request (commerce-related)
  - Business Opportunities: Post a financing, business, or partnership opportunity (commerce-related)
  - Job Postings: Post an available position
- Any Member can instantly post here, and it shows as a continuous live feed.
- You can filter results by region, topic, etc. to find exactly what you're seeking.
- These posts are also compiled and emailed out each Monday to the entire ProVisors Membership.

Referral Etiquette Guidelines

Referrals are our currency, so we want to make sure you're clear on how they work and the protocols surrounding them. The better you get at giving and receiving referrals, the more you'll see flowing your way!

Members should come prepared to share their network, including experiences, introductions, technical experience, and client referrals. Those ProVisors Members who are connectors benefit faster from ProVisors relationships. We are a relationship-based organization, not leads-based. Dynamic and productive referral relationships are based on communication, mutual respect, and reliability among ProVisors' network of professionals. It takes time to develop relationships, so while you may receive a referral quickly, we usually find that it takes some time for people to get to "Know. Trust. Like. Refer."

Referral Guidelines

To maximize effectiveness and eliminate confusion regarding ProVisors' Member referrals, please consider the following guidelines:

Always go back to the original referrer/initiating party (IP).
If at any time the client asks the referring party (RP) for a referral, it is standard protocol that the RP should go back to the IP and let them know the client is asking for a referral prior to giving a referral. That way the IP has the option of coming back to the client with their own referral. Or the IP may offer for the RP to refer their resources to fill the client's need.

Know your referral sources.
Understand the capabilities or practice of the individuals to whom you refer work. This allows you to make referrals with confidence and helps ensure a successful transaction. If you are unsure of a referral source's ability to handle a particular project, postpone any action until you can gather the necessary information to make an informed referral.

Present options.
Unless it is a "bet the company" kind of situation, consider providing more than one referral when possible. Your client will appreciate the opportunity to have a choice and may find one source to be a better match for his or her personality or budget. This approach gives you the opportunity to provide potential new business to more individuals within your cadre of referral sources.

Communicate your appreciation.
Acknowledge referrals whenever they come your way, regardless of whether a transaction occurs. Your colleagues will appreciate the recognition of their efforts to help build your business and will be more inclined to direct other prospects to you. Express your high regard for the IP to his or her referred prospects and you can help strengthen their relationships as well. Observe privacy and political protocol where appropriate.

Respectfully close the loop when it's not the right fit.
While every referral is appreciated, not every referral is appropriate. If you are unable to meet the needs of a referred prospect (or, if during your conversation with a referred prospect you learn of an additional need), please direct the individual back to the IP. A call to the IP advising him or her of the situation is encouraged. Always give the IP the opportunity to communicate with his or her contact and the chance to readdress the initial request for assistance or provide a different referral.

Communicate expectations upfront and provide follow-up.

Remember that the IP, acting as a Trusted Advisor, has directed an important contact to you for service. Respect this relationship by keeping the IP informed of your progress in a timely and succinct manner. When you are the IP, be specific about the frequency of follow-up communication you require. Courtesy is the standard. Respect each other's time and "need to know" information, as well as any fiduciary and privacy requirements.

Respect our policy on referral fees.
The ultimate spirit and intent of ProVisors involves the free flow and exchange of ideas and potential clients. As a result, unless otherwise customary and discussed at the time of the referral, it is not acceptable to expect or demand referral fees for prospect leads. In those cases where referral fees are customary, the fee split should be discussed at the time the lead is given.

Meeting Fees

Meeting registration fees for events are intended to cover the costs of the event itself, be it room rental, speaker fees or any other costs related to the event, which could, but does not necessarily, include food and beverages.

With respect to the issue of accommodating dietary restrictions and preferences, the ProVisors organization does not provide a lunch or any other food or beverage. That is fully up to the host of the event. ProVisors collects the registration fee as a courtesy for the group organizing the event, because the hosts for various events held by a group constantly change, and it would be extremely difficult if the fee collection is not centralized. While it is nice if a host can accommodate dietary restrictions, it is not within Provisors' purview to demand that they provide any kind of food or beverage, or what that may be if they opt to do so. It is also not prohibited for someone to bring their own food or beverage to an event, especially if they have dietary restrictions. However, because the registration fee is for the event itself, everyone who attends the event must pay the fee regardless of whether food is provided or if the attendees eat it.

In Conclusion

We're thrilled that you've joined ProVisors and look forward to turning you into a raving fan who celebrates many anniversaries with us. We find that the more you put into it, the more you'll get out of it, and we are here to support you as you start exploring.

If you have any questions or feedback along the way, please reach out to your Provisors Member Services Representative, Regional Director, or Home Group Leader. We're all committed to your success as part of the ProVisors community!